RFI SJVLS 16-001 Library Management System Cost and Consortia Features
Addendum 1
Notes from Vendor Teleconference, 10/8/15, 10 AM PDT

Overview: SJVLS is updating its information on the ability of current library management software to meet the needs of SJVLS as well as the costs of systems. The RFI focus is on price and a set of questions that reflect our primary functional concerns with software in our specific environment. The results will be compared against both the current Horizon system and the Evergreen open source software.

Questions and answers from the teleconference

Q1. The RFI seems to request pricing on both hosted and on-premises systems?

> A1. We asked for both because there are some library management systems which are only available hosted. We have doubts that a hosted solution will meet our needs for access to the database, due to restrictions placed by vendors, but felt it was better to ask for both. We have a very new data center with lots of space, so our preference is probably on premises.

Q2. Are there features that are more heavily weighted than others in your evaluation?

> A2. The three items that would definitely make or break our assessment of a system are

> 1 – Holds functionality We have a specific way that we would prefer hold fulfillment to work, which is a blend of transit reduction and queue order. We lend a lot of materials between libraries and it is essential that the system operate efficiently, while still maintaining queue order when we want queue order.

> 2 – Bibliographic record import/overlay   We do not centralize bibliographic record import, which creates lots of opportunities for a "bad" overlay. We have a less than ideal workaround in Horizon and are very interested systems with more sophisticated ability to determine when the incoming record should or should not overlay. We don't want lesser vendor records replacing good OCLC records.

> 3 – Floating control   The ability to have materials "float" between branches is an essential part of several member's inventory control models. While the library wants those designated materials to float between their branches, they do not want them to float outside of the jurisdiction.

> Other things, like keeping acquisitions orders and funds separate are important, but are more likely to have work arounds if other features are attractive.

Q3. We were asked to confirm that our intention is to weigh the RFI responses against the Evergreen responses, and based on that outcome decide whether or not to issue an RFP, and if an RFP is issued, who would be invited to respond.

A3. That is correct. One additional clarification post-call, is that we will consider not migrating at all and staying on Horizon.

Q4. What would be the anticipated timeline of an RFP and migration?

A4. The earliest an RFP would be issued would be February 2016. Our Horizon server is less than 3 years old and performing fine, so there is no pressure to migrate quickly. Late 2016 would be the earliest migration timeframe.

Q5. What vendors do you do EDI ordering with?

A5. Primary vendors are Baker & Taylor, Ingram and Midwest Tape, but basically anyone who supports it.

Q6. You list a lot of 3rd party products. Would you want API interface with Overdrive?

A6. Ideally, yes. But any integration must work well for the consortia environment with separate Overdrive collections.

Q7. Who do we use for ILL?

A7. Most loans are fulfilled within the shared ILS, so are really just holds rather than traditional ILL. Two members actively use OCLC for requests that cannot be filled within the SJVLS collections.

Q8. Do all members use a common system for the ILS?

A8. All SJVLS members use Horizon, in a single database with shared bibliographic records and borrowers – but with some variation in circulation rules between libraries. We share as much as possible.

Q9. You use Comprise for credit card payments?

A9. Yes, and that is only online payments. We do not do point-of-sale, primarily due to the difficulty of meeting PCI rules in our 100+ branch network.

Q10. Are the bookmobiles online or just delivery mechanisms?

A10. The bookmobiles are mostly offline circulation, but some are using VPN. Some of our stops are either in dead zones or out in rural areas where there is no coverage. We also have 5 book machines that have been programed to file offline circulation file formats. The data is collected once or twice a week from the machines and uploaded. They are in very small rural communities, so they don't worry about loss.

Q11. Are school libraries part of the system, and if so, are they districts?

A11. Our official policy is that a joint use branch only operates on Horizon as a public library and the students are public library patrons, not student records. We don't interface with school accounting or enrollment systems.

The deadline for clarifications is October 16th, and the RFI closes on the 29th at 3 PM. The Automation Committee will meet on November 18th to draft a recommendation to the Administrative Council.